

# RISK OUTLOOK

SEPTEMBER 2026

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# Political and Economic Outlook

By Marisa Lourenço

## Foreign Investment in South Africa: More capital, more competition, more conditions

South Africa is entering a more competitive and politically charged foreign-investment environment as relations with the United States (US) deteriorate and alternative sources of capital gain ground.

The Trump administration is using regulation, trade restrictions and economic pressure to advance wider strategic objectives. China is embedding itself more deeply in infrastructure, energy and manufacturing, while Gulf investors are acquiring positions in established strategic assets.

This is not a straightforward pivot away from the West. South Africa is more likely to draw on different sources of capital for different needs while protecting domestic priorities around industrialisation, localisation and economic transformation.

The result will be a more transactional and sector-specific environment in which the origin of capital matters almost as much as its cost.

## US plays hardball

The deterioration in US-South Africa relations has been building for several years, as highlighted throughout our 2025 Risk Outlooks.

Disagreements over the Lady R allegations, South Africa's case against Israel at the International Court of Justice and closer relations with BRICS members, particularly China and Russia, have steadily eroded trust.

The sharpest change came with Donald Trump's return to office in January 2025. His administration began using trade, legislation and regulation alongside traditional diplomacy to influence foreign governments.

South African exporters have since faced repeated policy changes, together with separate Section 232 measures affecting vehicles, steel and aluminium.

Trade policy has also moved beyond conventional concerns about deficits or industrial protection. In March, the Office of the US Trade Representative included South Africa among 60 economies investigated under Section 301 for failing to restrict imports produced with forced labour.

Measures announced in July imposed additional tariffs of 10% or 12.5%, with South Africa facing the higher rate on most covered products not already subject to Section 232 measures.

The significance extends beyond the immediate tariff burden. US standards on labour, supply chains, national security and economic protection are increasingly being projected through trade policy.

For South African companies, market access may depend not only on what they export, but on how and where their products and inputs are produced.

Congressional pressure adds another layer. The proposed US-South Africa Bilateral Relations Review Act would assess whether South Africa has undermined US interests and identify senior government and ANC figures who could potentially face sanctions.

US investment will not disappear, but future engagement will take place within a more politically conditioned relationship in which decisions in Washington can rapidly alter the cost and risk of doing business.

## China's long game

China has adopted a different approach, moving beyond trade to embed Chinese companies in electricity infrastructure, renewable energy, manufacturing and logistics—sectors central to South Africa's long-term growth.

Electricity illustrates the strategy. Minister Kgosientsho Ramokgopa's August visit to China focused on generation, transmission, grid expansion, renewable energy, advanced manufacturing and engineering capability.

South Africa plans to add 14,500 kilometres of transmission infrastructure by 2035 while expanding generation and developing a competitive electricity market. It cannot finance this from the public balance sheet alone.

Chinese companies offer capital and established capabilities in grid equipment, renewable generation, batteries and manufacturing. Their involvement is already visible in Seriti Green's 155-megawatt Ummbila Emoyeni wind project, which entered commercial operation in July with Goldwind as its principal technology partner.

Goldwind has described South Africa as a regional operational and technical centre for its wider African business.

This forms part of a broader move from large state-backed infrastructure projects towards renewable energy, critical minerals, manufacturing and battery supply chains.

Between 2010 and 2024, Chinese renewable-energy investment and construction activity in Africa reached an estimated USD 66bn, while renewables represented 59% of announced Chinese energy projects on the continent in 2024.

For South Africa, the opportunity is greater than financing alone. Chinese investment could close infrastructure gaps while supporting manufacturing, technology transfer and regional supply chains.

It will also deepen reliance on Chinese equipment, technology, finance and maintenance. Infrastructure that solves an immediate constraint may therefore create a longer-term commercial dependency.

### The Gulf's quiet expansion

Gulf states are pursuing a third model. Where China embeds itself through industrial capability and supply chains, Gulf investors expand primarily through capital and ownership, taking long-term positions in valuable energy, logistics, resource and trade assets.

Gulf Cooperation Council states have invested more than USD 100bn in Africa over the past decade, according to Chatham House.

The United Arab Emirates accounts for an estimated USD 59.4bn and Saudi Arabia USD 25.6bn, concentrated largely in ports, logistics, agriculture, energy and critical minerals.

South Africa is increasingly part of this expansion. ADNOC Distribution's approximately USD 1bn acquisition of Shell Downstream South Africa gives the Emirati state-owned group a network of about 580 service stations and related fuel businesses.

The network sold approximately 3.5bn litres in 2025 and represents roughly 10% of the domestic fuel-retail market.

The transaction may provide a template for further Gulf investment: acquire an established strategic asset, retain meaningful domestic ownership and use the South African business as a regional platform.

ADNOC has indicated that 28% will ultimately transfer to the Reatile Group and an employee ownership structure, accommodating South Africa's ownership framework rather than requiring it to change.

Chinese and Gulf capital both expand foreign state-linked influence, but through different mechanisms.

Chinese capital is becoming embedded in infrastructure and industrial supply chains; Gulf capital is more likely to secure ownership of strategic assets and commercial nodes.

**Figure 1: Three models of foreign capital investment in Africa**

The source of investment shapes the opportunity, the conditions attached and the long-term exposure for South Africa

|                                      | United States                                                       | China                                                                   | Gulf States                                                          |
|--------------------------------------|---------------------------------------------------------------------|-------------------------------------------------------------------------|----------------------------------------------------------------------|
| <b>Primary model</b>                 | Market access and political or regulatory conditionality            | Infrastructure and industrial integration                               | Long-term capital and strategic asset ownership                      |
| <b>Principal sectors</b>             | Technology, manufacturing, financial services and export industries | Energy, electricity grids, renewable technology and manufacturing       | Energy, logistics, mining and major commercial assets                |
| <b>What South Africa gains</b>       | Market access, technology and corporate investment                  | Financing, infrastructure, technology and supply-chain participation    | Patient capital and capacity for large-scale acquisitions            |
| <b>Main exposure</b>                 | Tariffs, sanctions and changing regulatory conditions               | Long-term technology and supply-chain dependence                        | Growing foreign state-linked ownership of strategic assets           |
| <b>Fit with South African policy</b> | Greater friction over B-BBEE and localisation requirements          | Generally adaptable to localisation and domestic ownership requirements | Generally adaptable to domestic ownership and empowerment structures |

### What South Africa wants from foreign capital

For President Cyril Ramaphosa's administration, the objective is not simply more investment, but capital that solves domestic problems. Weak growth constrained public finances and infrastructure deficits mean the state cannot fund the required investment in electricity, rail, ports and water alone.

Government will favour investment that expands productive capacity through manufacturing, skills transfer, localisation and domestic supply chains.

There is also a political imperative. As the 2029 election approaches, the ANC will face increasing pressure to demonstrate progress on growth, employment and infrastructure.

The need for capital does not mean government will abandon Broad-Based Black Economic Empowerment (B-BBEE), localisation or sector-specific ownership requirements. Chinese and Gulf investors have generally accommodated local ownership and partnership requirements; Starlink's public dispute over B-BBEE illustrates the greater friction that some Western investors may encounter.

Large transactions may also affect the ANC's wider political and fundraising environment where empowerment structures create opportunities for politically connected figures and established B-BBEE investors.

This does not mean such transactions are primarily intended to fund the party, but the distribution of local equity and commercial opportunity can carry political consequences.

The capital South Africa will value most is therefore likely to be long-term, productive and able to support infrastructure or industrial development while accommodating transformation and localisation.

### Who sets the terms?

There is no single authority responsible for investment policy. The Presidency coordinates the investment drive, relaunched in March with a target of at least ZAR2 trillion over five years, but individual investments are shaped across government.

The Department of Trade, Industry and Competition oversees industrial policy, trade administration and B-BBEE, while the Competition Commission considers employment and ownership during merger reviews.

National Treasury focuses on fiscal sustainability, bankability and the allocation of risk. Energy and minerals departments act as sector gatekeepers, while the Department of International Relations and Cooperation facilitates state-to-state engagement.

The Government of National Unity adds friction rather than paralysis. The ANC and DA agree on the need for investment and growth but differ over transformation and industrial policy. The current B-BBEE review is more likely to improve implementation than abandon transformation.

South Africa is therefore unlikely to adopt a uniformly pro-China, pro-US or pro-Western position. Different forms of capital will be favoured for different sectors according to their financing, technology, ownership and industrial characteristics.

### Navigating a more fragmented investment landscape

Foreign capital can no longer be assessed only by price, commercial terms and expected returns. The investor's nationality, beneficial ownership, government links, financing sources, sanctions exposure and supply-chain dependencies increasingly matter.

South African requirements covering B-BBEE, localisation, competition and ownership must coexist with foreign rules on sanctions, forced labour, national security, supply-chain provenance and technology transfer.

Compliance with one system does not guarantee compatibility with another.

Technology and supplier lock-in require particular attention. Chinese capital and equipment may create later vulnerabilities in maintenance, software, replacement equipment and financing.

Gulf ownership may bring patient capital and expertise, but also increases foreign state-linked participation in infrastructure important to the domestic economy.

Businesses must also identify where effective government leverage sits. The relevant stakeholders will differ for a transmission project, mine, refinery, technology platform or corporate acquisition.

Understanding which ministry, regulator or political office can accelerate, reshape or block a transaction is becoming an essential part of planning.

The opportunity is a wider choice of capital as Chinese, Gulf, US, European and other investors compete in overlapping sectors. This could improve financing options and reduce reliance on any single partner.

Diversification will strengthen resilience, however, only if South Africa and its businesses avoid replacing one dependency with another.

# Crime Overview

By Johann Fourie

## Recorded crime declines, but commercial threats remain entrenched

South Africa's crime environment remained Elevated between 1 July and 31 August 2026.

The latest SAPS statistics show measurable reductions across several serious crime categories, but these improvements occurred from an exceptionally high baseline and do not indicate a fundamental reduction in business risk.

The SAPS first-quarter statistics, covering April to June 2026, provide the latest official baseline for the reporting period.

Murder decreased by 5.9%, robbery with aggravating circumstances by 14.7% and carjacking by 18.2%. Residential robbery declined by 17.6%, business robbery by 11.8% and truck hijacking by 21%, while overall contact crime decreased by 2.3%.

KwaZulu-Natal, the Western Cape and Eastern Cape also continued to experience entrenched violent crime, gang activity, extortion and attacks on commercial operations.

Kidnapping was an important counter-trend, increasing by 3.9% to 4,638 cases. While this category includes incidents connected to robbery, hijacking and interpersonal disputes, financially motivated abductions are becoming increasingly significant.

SAPS also recorded 519 extortion cases and 106 blackmail cases, with financial extortion accounting for 291 cases, including 73 ransom-related incidents.

The true scale is likely higher because businesses may avoid reporting threats due to fear of retaliation.

Commercial transport remained under sustained pressure. Industry reporting indicated approximately 35 truck hijackings per week, with food, cooking oil and other fast-moving consumer goods increasingly targeted because they can be rapidly redistributed through informal markets.

The official decline in truck hijacking is positive, but predictable routes, compromised information, insider facilitation and established markets for stolen goods continue to support organised cargo crime.

Cash-in-transit robbery presented a similarly mixed picture. Although SAPS reported a quarterly decline, almost 120 CIT robberies were recorded nationally between January and mid-August. Gauteng accounted for approximately 42% and KwaZulu-Natal 23%.

The use of explosives, automatic firearms and coordinated escape vehicles means that CIT robbery remains a lower-volume but exceptionally high-impact threat.

Law enforcement maintained a substantial operational tempo. Operation Shanela II recorded 15,798 arrests, the seizure of 153 unlicensed firearms and the recovery of 86 stolen or hijacked vehicles between 27 July and 2 August.

Police also intercepted cocaine valued at approximately ZAR 28mn at OR Tambo International Airport and seized counterfeit and illicit goods worth more than ZAR 30mn in Gauteng.

These results demonstrate meaningful disruption capability, but the arrest and seizure volumes also illustrate the scale of criminal activity requiring continuous intervention.

**Figure 2: Key crime indicators | April–June 2026**

| Declining categories              |                         |
|-----------------------------------|-------------------------|
| <b>Murder</b>                     | 5.9% ▼                  |
| <b>Aggravated robbery</b>         | 14.7% ▼                 |
| <b>Carjacking</b>                 | 18.2% ▼                 |
| <b>Business robbery</b>           | 11.8% ▼                 |
| <b>Truck hijacking</b>            | 21.0% ▼                 |
| Persistent and increasing threats |                         |
| <b>Kidnapping</b>                 | 4,638 cases             |
| <b>Extortion</b>                  | 519 cases               |
| <b>Financial extortion</b>        | 291 cases               |
| <b>Ransom-related</b>             | 73 cases                |
| <b>CIT robberies</b>              | 120 cases by mid-August |

Despite these reductions, more than 5,400 murders and 26,800 aggravated robberies were recorded in 90 days.

Gauteng remained central to the national crime picture, recording 1,276 murders and carrying the greatest concentration of carjacking and commercial-transport exposure.

Public-order conditions remained broadly stable, although NATJOINTS recorded 212 incidents during July, including nine unrest-related incidents and five involving looting.

Politically motivated murders involving party members and councillors were also recorded in several provinces.

This does not yet indicate widespread election instability, but raises the potential for targeted violence around candidates, municipal structures, contested projects and procurement interests.

### Business Outlook | Elevated

National percentage reductions should not be interpreted as uniform improvements at operational level.

Logistics, mining, construction, retail, warehousing, cash-handling and critical-infrastructure operations remain particularly exposed.

Security measures should remain intelligence-led and location-specific, with particular attention to:

- ▶ Route planning and cargo-movement controls.
- ▶ Protection of operational information.
- ▶ Insider-risk indicators.
- ▶ Executive and employee movement.
- ▶ Extortion and kidnapping escalation protocols.
- ▶ Tested response and business-continuity arrangements.

## Unrest Outlook

### Localised disruption persists as political and community pressures build

South Africa enters September with an unrest environment that remains active but fragmented. The nationwide disruption anticipated around the 30 June anti-immigration mobilisation did not materialise.

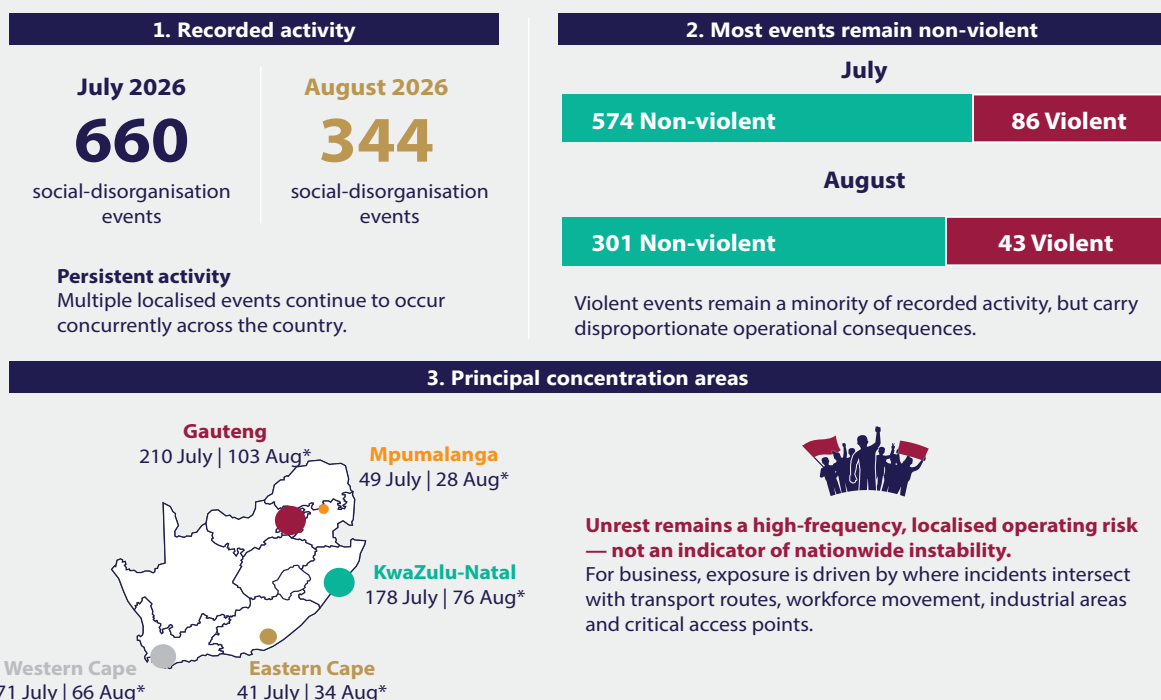
However, ThreatInsights monitoring during July and August confirmed that the underlying drivers of protest activity remain firmly in place.

As shown in Figure 3, social-disorganisation activity remained concentrated in Gauteng and KwaZulu-Natal, with continued reporting from the Western Cape, Eastern Cape and Mpumalanga.

Most recorded incidents were peaceful or non-violent. The prevailing pattern is therefore not one of coordinated national instability, but of multiple localised disruptions developing independently and, in some cases, simultaneously.

**Figure 3: National unrest activity and concentration**

ThreatInsights reporting shows persistent, predominantly non-violent unrest concentrated in South Africa's major economic provinces.



Source: BPC ThreatInsights processed alerts | July 2026 and 1–25 August 2026

### **Mobilisation is becoming more localised**

A significant development has been the continuation of anti-migrant mobilisation beyond the initial nationally publicised campaign.

Monitoring identified 45 anti-migrant demonstrations between 1 and 20 July, with more than 30% involving violence.

Approximately two-thirds were reportedly organised by community structures or local residents rather than directly by the March and March movement.

This suggests that anti-migrant mobilisation is becoming less dependent on national organisations or formally announced campaigns. Local grievances, competition for employment and trading opportunities, service-delivery failures and political interests can generate similar actions with limited warning.

Foreign-owned businesses were looted during unrest in parts of KwaZulu-Natal and the Eastern Cape. Violence and vehicle arson occurred at Northam in Limpopo, while an anti-immigration protest in Bellville on 19 August deteriorated into clashes, looting and a substantial police response.

These incidents do not indicate a national breakdown in public order, but demonstrate how quickly a local action can escalate when established grievances, crowd mobilisation and opportunistic criminality converge.

### **Business exposure is primarily operational**

For most businesses, the principal unrest risk remains operational disruption rather than deliberate targeting. Road closures, burning barricades and gatherings near industrial areas can prevent employees from reaching work, interrupt deliveries and restrict access to facilities.

Even a peaceful demonstration may have a significant effect when it takes place on an arterial route, at an industrial entrance or near a logistics node.

Retailers and businesses situated within or immediately adjacent to protest areas face greater direct exposure to opportunistic looting, intimidation, property damage and threats to personnel.

Gauteng and KwaZulu-Natal require particular attention because both contain nationally important logistics, manufacturing and commercial corridors.

Localised disruption in these provinces can therefore affect operations and supply chains well beyond the immediate protest location.

The practical concern is not only whether an incident becomes violent, but whether its location, timing and duration affect workforce movement, site access, distribution or continuity of operations.

### **September creates a defined mobilisation window**

The 30 September deadline associated with the March and March anti-immigration campaign is the most immediate identifiable mobilisation point.

It does not indicate that nationwide unrest will occur, but increases the prospect of demonstrations and confrontational activity around known campaign locations. Independent action by community groups may also result in related incidents outside formally announced events.

This mobilisation window coincides with persistent service-delivery grievances, labour disputes, unemployment and pressure on municipal services.

Political activity ahead of the Local Government Elections is also expected to become more visible, increasing the possibility that community disputes will acquire a political dimension.

### **Outlook | Amber**

Bidvest Protea Coin (BPC) assesses the national unrest outlook as **AMBER**.

There are insufficient indicators of sustained nationwide civil instability.

The more probable outlook is continued, geographically dispersed protest activity, with individual incidents capable of escalating rapidly and causing material local disruption.

Businesses should manage unrest as a continuing operational risk. Monitoring must extend beyond national announcements to local community forums, ward-level disputes, informal communications and activity near sites and transport routes.

Priority measures should include:

- ▶ Early identification of local mobilisation.
- ▶ Route and site-access monitoring.
- ▶ Workforce and delivery contingency arrangements.
- ▶ Defined escalation and decision-making thresholds.
- ▶ Tested business-continuity measures for affected operations

## Spotlight On: The Evolution of Drones in Security

By Heico Kühn UDS Chief Operations Officer  
& Johann Fourie National Manager: Security Risk Management and Solutions

### Introduction: From aerial surveillance to crime prevention

The use of drones in security has progressed from emerging aerial technology to an established, regulated operational capability.

Unmanned Aircraft System (UAS) are now used for surveillance, alarm verification, infrastructure monitoring, suspect tracking and tactical support across mining, forestry, energy and linear infrastructure operations.

This growth has been driven by limitations in conventional security. Fixed cameras observe only their installed field of view, while ground patrols require time to reach remote or inaccessible areas.

When an alarm activates beyond camera coverage, responders may have little information about its cause, the number of people involved or their direction of movement.

Early deployments extended surveillance reach but often treated the aircraft mainly as an observation platform. Drones could locate suspects and follow their movement, but detection did not guarantee that ground resources were available or positioned to intervene.

Operational experience therefore shifted the focus from general aerial observation to intelligence-led deployment against defined risks.

Aircraft and operating systems also became more capable. Multi-rotors enabled rapid deployment and close observation.

Fixed-wing aircraft provided greater endurance over extensive areas. Vertical Take-off and Landing (VTOL) platforms combined longer-range flight with deployment from locations without conventional runways.

More recently, dock-based systems have enabled scheduled and remotely activated missions.

Within this evolution, UAV & Drone Solutions (UDS), a Bidvest owned company, and BPC played different pioneering roles.

UDS was established as a specialist drone company focused on the development, manufacture and commercial operation of UAS systems. It pioneered locally developed, longer-endurance aircraft and the aviation infrastructure required to support sustained operations.

BPC was an early adopter of drones as an operational security tool.

It began using multi-rotor aircraft in specialist security operations in 2013, applying aerial capability to alarm verification, threat detection, suspect tracking and the direction of tactical resources.

These are distinct capabilities. UDS operates independently across a broad client base and works with various security, technical and operational service providers. BPC uses its drone capability primarily within tactical and specialised security operations.

Where a longer-term requirement benefits from both sustained aerial coverage and specialist ground intervention, the two entities can operate as complementary partners.

### Two pioneering roles

UDS pioneered the local development, manufacture and deployment of longer-endurance UAS. Its fixed-wing platforms enabled scheduled surveillance across extensive operating areas, making them suitable for mine boundaries, forestry estates, pipelines, rail corridors and other environments requiring sustained coverage.

South Africa's remotely piloted aircraft regulations took effect on 1 July 2015. In October 2015, UDS became the first South African organisation to receive a Unmanned Aircraft Systems Operating Certificate (UASOC) from the South African Civil Aviation Authority (SACAA).

This placed the company at the forefront of South Africa's regulated commercial drone industry.

From its establishment as a drone company, UDS has provided the complete aviation capability required to conduct these operations, including aircraft, pilots, flight planning, maintenance, technical support and regulatory governance.

Its services include sustained aerial surveillance, infrastructure inspection, perimeter monitoring, alarm verification and remote deployment.

UDS delivers these services directly to clients and in cooperation with a range of service providers.

BPC's pioneering role was primarily in the tactical application of drones within security operations. Its early multi-rotor deployments supported forestry, mining and linear infrastructure environments where distance, terrain and limited camera coverage constrained conventional security measures.

BPC initially conducted these deployments through appropriately authorised aviation arrangements while developing the operational methods needed to connect aerial observation with intelligence and ground intervention.

Following Bidvest's acquisition of UDS in 2019, UDS retained its identity and operating role as a specialist drone company serving its broader market.

The relationship also created the option for UDS and BPC to combine their respective capabilities where appropriate.

### Closing the detection-response gap

A historical operating dataset demonstrated why aerial detection alone does not necessarily result in an effective security outcome.

Over 12 months, drones completed approximately **11,500 flight hours across 12 sites**, identified **589 suspected offenders** and **113 arrests** followed.

Approximately 81% of the identified suspects were not apprehended because tactical resources were not always available or positioned to intervene in time.

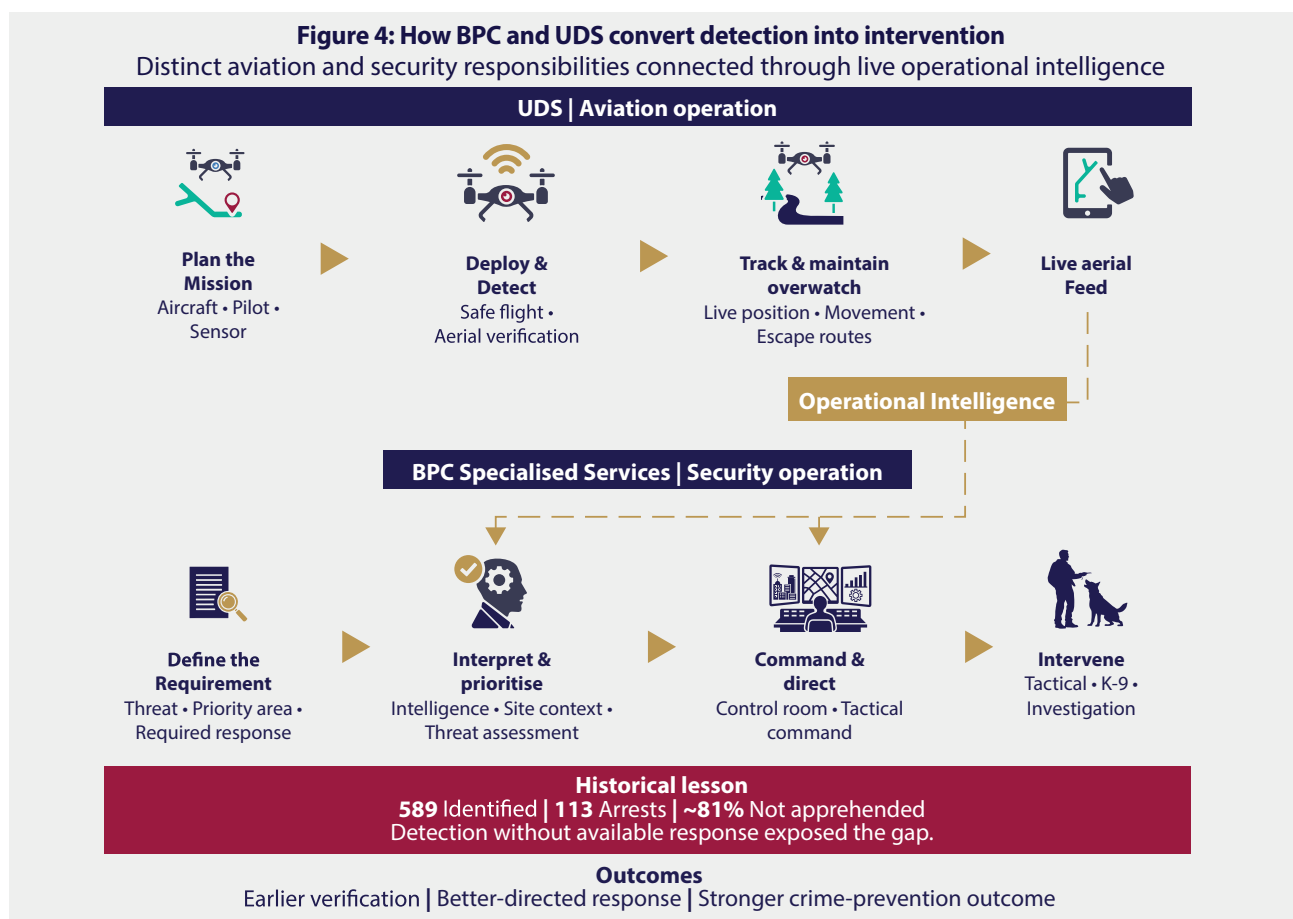
The aircraft had performed its surveillance function. The weakness existed between detection and response.

This experience influenced the development of BPC's tactical drone model. Where intervention forms part of the requirement, the flight and ground deployment are planned around the same threat picture.

Intelligence identifies the assets being targeted, the methods used, likely approach and escape routes, and the periods during which incidents are most likely.

During a direct tactical deployment, the pilot maintains observation of suspect movement, terrain and escape routes while the ground team moves towards containment or interception.

Communication takes place directly between the pilot and tactical commander, allowing resources to adjust their position as the situation develops.



In a fixed-site operation, aerial information may instead be incorporated into an established control-room and response process. The communication structure follows the requirement. A control room is not a prerequisite for direct tactical deployment.

Later operations demonstrated the potential improvement. Between January and May 2021, drone-supported interventions contributed to **89 arrests**, the recovery of approximately **1.9 tonnes of copper cable** and **9,000 litres of stolen diesel**. Other deployments supported the detection and deflection of illegal miners.

These results relate to separate operations and reporting periods. Collectively, however, they demonstrate how outcomes can improve when aerial information is connected to intelligence, tactical direction and an available ground response.

#### Matching the aircraft to the mission

No single aircraft suits every operating environment. Fixed-wing aircraft provide endurance for large estates, pipelines, rail corridors and mine boundaries.

Multi-rotors support rapid alarm verification and tactical operations because they can hover and reposition as movement changes. VTOL platforms combine extended reach with operation from sites without conventional runways.

UDS selects the aircraft, sensor and operating method according to the aviation mission. Its aircraft and technical infrastructure support sustained surveillance, inspection and monitoring across extensive or complex environments.

BPC's aircraft and operating methods are selected primarily for tactical and specialised security missions. The deployment is shaped by the identified threat, information requirement and intended ground response.

Specifications must nevertheless be interpreted operationally. Advertised endurance includes travelling to the target and returning with a safe battery reserve.

Wind, altitude, temperature, manoeuvring and payload weight reduce the usable time available over the surveillance area.

Sensors also have limitations.

Thermal cameras detect temperature differences, not criminal intent. Vegetation, structures, distance and ambient conditions affect what an operator can see.

Analytics may identify people, vehicles and unusual movement, but alerts still require human verification.

Effective operations therefore depend on more than the aircraft. They require licensed personnel, maintained systems, reliable communications, flight planning, technical support and sufficient operational redundancy.

#### Intelligence and ground action

Routine aerial patrols provide broad coverage, but predictable routes and schedules may become visible to organised criminals.

Effective security deployments must therefore be intelligence-led. The objective is to concentrate the aircraft over priority assets during identified periods of risk and maximise meaningful time over target.

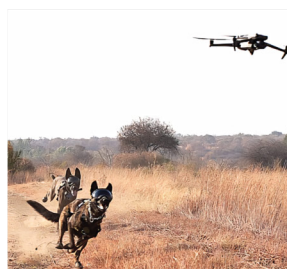
In BPC tactical operations, the UAS forms part of a wider specialist deployment. The pilot provides live information on suspect movement, direction, terrain, escape routes and emerging hazards.

Cross-training between pilots and tactical teams has established common terminology for approach routes and interception points. Pilots also consider how altitude, flight direction, lighting and aircraft noise may affect suspect behaviour or compromise an approaching team.

BPC has extended this approach through drone-directed K9 operations. When suspects enter vegetation, structures or terrain where aerial visibility is reduced, the pilot directs the handler towards the last known position while monitoring possible exits.

Selected K9s may carry video and communication equipment, providing a ground-level view during the search.

The aircraft maintains the wider operating picture, the tactical commander directs the intervention and the K9 extends the search into areas where the aerial sensor may no longer provide a clear view.



This integrated field model applies to BPC tactical operations and to longer-term security operations where UDS and BPC are appointed as complementary partners. It does not define or restrict the independent aviation services provided by UDS.

### **Remote deployment**

Dock-based or “drone-in-a-box” systems allow an aircraft to launch remotely, complete a scheduled or alarm-activated mission, return and recharge.

UDS provides this capability through Drone in a Box (DOCKS) for perimeter patrols, infrastructure inspection and alarm verification.

Positioning an aircraft close to the surveillance area can reduce routine mobile deployments and shorten verification times.

Remote operations still require aviation oversight, reliable power and communications, weather monitoring, maintenance, regulatory compliance and appropriate data security.

Fixed docks may create a single point of failure, while predictable routes can become visible to organised criminals. Intelligence must therefore inform where DOCKS are positioned, when missions are flown and how routes are varied.

PODS is best suited to repeatable missions in defined environments. Mobile UDS teams remain important where locations and requirements change. Where a developing threat requires tactical intervention, BPC can deploy its own specialised drone and ground capabilities.

For longer-term operations requiring sustained aviation coverage together with an integrated security response, UDS and BPC can operate as complementary partners.

UDS provides aviation endurance, specialist aircraft, technical support and sustained operating capacity.

BPC provides threat intelligence, tactical command and specialist ground resources.

### **Measuring operational value**

Flight hours and completed missions demonstrate activity, but not necessarily security value. Performance must be measured against the purpose for which the drone was deployed.

For UDS operations, relevant measures include surveillance coverage, infrastructure anomalies identified, alarm-verification time, aircraft availability, avoided ground deployments and the quality of information provided to the client or its appointed service provider.

For BPC tactical operations, the measures extend to the time from detection to response, suspects located, arrests supported, assets recovered, losses prevented and changes in criminal methods.

The evolution of drones in security is therefore not only about improved aircraft. UDS pioneered the establishment of a regulated, specialist drone capability serving a broad client and service-provider base.

The value lies in selecting the correct aircraft, operating model and response arrangement for the requirement—and ensuring that the information produced leads to better operational decisions.

# Main Contributors

## Acknowledgements

The Monthly Risk Outlook is developed to provide executive decision-makers with critical insights into the evolving risk landscape. This publication is the result of the expertise and analysis of the BPC Security Risk Consulting Team, delivering intelligence-led assessments to support strategic decision-making.

The Political and Economic Section features expert insights from Marisa Lourenço, an independent risk consultant based in Johannesburg, South Africa. Marisa specialises in country risk analysis and due diligence investigations for multinational corporations, including Fortune 500 companies, operating across sub-Saharan Africa. Her assessments are regularly featured in both local and international media.

We acknowledge the contributions of all subject matter experts whose insights shape this publication, ensuring decision-makers have the intelligence needed to navigate an increasingly complex risk environment.

## Guest Contributors – Spotlight On: The Evolution of Drones in Security

Heico Kühn, Chief Operations Officer of UDS, shares his expert insights into the implementation, operationalisation, and strategic integration of drone technology within organisations.

**+27 12 665 8000**  
**info@proteacoin.co.za**  
**www.proteacoin.co.za**

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